

Orders - SKY Energy

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Overview

A listing of all Energy Product Delivery Orders (PDO) is available in SKY Energy. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.

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Energy Orders

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Ticket N...	Location	Call In ...	Due Date	Status	Customer	Phone	Tank Se...	Order T...	Tank De...	Route
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
1	Main Plant	10/31/2017	10/31/2017	Incomplete	James Ade	217-562-25...	250156	Gallons	Home Heat	North
2	Main Plant	11/02/2017	11/02/2017	Incomplete	Donna Roper	217-632-24...	354161	Gallons	Home Heat	South
1002	Main Plant	10/31/2020	10/31/2020	Incomplete	James Ade	217-562-25...	250156	Gallons	Home Heat	North
3005	Main Plant	01/26/2023	01/26/2023	Incomplete	Tommy Teste	217-774-99...	A123C589	Percent	Home Heat	--
3009	Main Plant	12/18/2023	01/18/2024	Incomplete	Tommy Teste	217-774-99...	A123C589	Percent	Home Heat	--
4009	Main Plant	01/18/2024	01/18/2024	Incomplete	Tommy Teste	217-774-99...	461235	Percent	Grain Dryer	South
4010	Main Plant	01/18/2024	01/18/2024	Incomplete	Tommy Teste	217-774-99...	A123C589	Percent	Home Heat	--
4013	Main Plant	08/07/2024	08/07/2024	Incomplete	Barry Anders	217-226-23...	85975465	Percent	BA Tank	North
4014	Main Plant	09/10/2024	09/10/2024	Incomplete	Barry Anders	217-226-23...	85975465	Percent	BA Tank	North

Items per page 50

< < 1 of 1 > >

Columns displaying include:

- Ticket Number – Formerly known as *Call In ID*.
- Location
- Call In Date
- Due Date – This column defaults to ascending (oldest date at the top).
- Status – This column defaults to show *Incomplete* first.
- Customer
- Phone
- Tank Serial Number
- Order Type
- Tank Description
- Route
- Region

Note: Any field without data will show a double dash (--).

A full page view of Product Delivery Order information is available by selecting the *Ticket Number* on the *Orders*

grid or from the *Tank History* page.

View Product Delivery Order

Product Delivery Order #1002

Tank

Tank Serial Number	Customer Name	Customer ID	Credit Status	Location	Location ID
250156 ↗	James Ade ↗	Adeja	✓ Fair	Main Plant	00MAIN

Order Details

Call In Date
10/31/2020

Due Date
10/31/2020

Additional Comments
--

Delivery

Product Name
Propane - Home Heating

Product ID
PropHH

Product Location
Main Plant (00MAIN)

Current %
80 ⓘ

Out of Gas
No

Times Out of Gas
0

Deliver By
Number of Gallons

Number of Gallons
50

Charge Price
\$3.85 / Gal

Amount Needed
50 Gal

For more information on how to use the *Energy Product Delivery Order* grid see, [Using Grids in Agvance SKY](#).

To view more Customer details, select the Customer name link to open that specific Customer's SKY Customer Overview page. Read more about the [SKY Customer Overview](#) page.

Product Delivery Orders

A user permission is required to enable adding or editing a Product Delivery Order within SKY Energy at SKY Company Admin / User / Edit User. Toggle on *Add/Edit Order* to add or edit a Product Delivery Order on the Orders page of SKY Energy that has not been invoiced. Invoiced PDO's will always be view only.

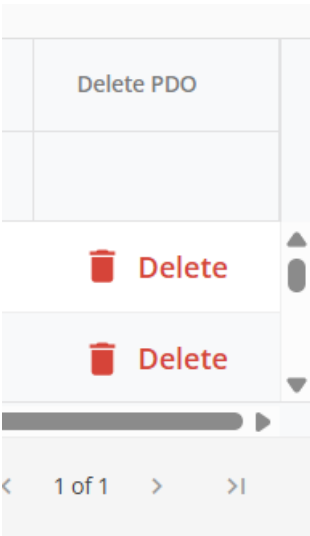
- ☒ Energy
- ☒ Add/Edit Order
- ☒ Add/Edit Tank
- ☒ Delete PDO
- ☒ Delete Tank

On view of a Product Delivery Order, selecting **Tank Serial Number** opens the selected tank information in a new tab and with access to SKY Customer, selecting **Customer Name** opens the selected customer's SKY Customer page in a new tab.

On the *Add/Edit* view of a *Product Delivery Order*, selecting **Tank Serial Number** opens the selected tank information

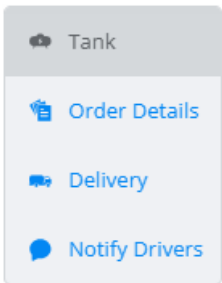
in a new tab, and with access to SKY Customer, **Customer Name** opens the selected customer's SKY Customer page in a new tab. Also, to change or remove the selected tank on a new PDO, select **Remove Tank**. That tank will be removed and the **+ Add Tank** button will be visible again.

Delete Product Delivery Orders from the *Orders* page using the **Delete** action column if incorrect or unneeded. The SKY User permission *Delete PDO* is required to use the Delete option.



Open SKY Energy / Orders, hover over the blue + icon, and select **New Product Delivery Order**.

On the *New Product Delivery Order* page, all fields will appear with sections expanded. The left navigation tree expands view upon hovering, and choosing a section will jump to that area of the form.



Tank

New Product Delivery Order

Tank ▲

Tank Serial Number	Customer Name	Customer ID	Credit Status	Location	Location ID	Remove Tank
250159 🔗	Larry Baker 🔗	12345	✓ Excellent	Main Plant	00MAIN	🗑 Remove

- Add the Tank to order by selecting **+ Add Tank** to open the search overlay and choose from active tanks. The *Tank Serial Number*, *Customer Name*, *Location*, and *Credit Status* fields will populate upon choosing **Select + Close**.
 - Once the Tank has been added, it can be removed and replaced if needed by selecting **Remove Tank** and choosing **+ Add Tank** to select the replacement.

Note: Adding a Tank is required to enter a Product Delivery Order.

Order Details

Order Details

Call-In Date* 6/10/2025 	Due Date* 6/10/2025 
--	--




Additional Comments

0 / 250

- **Call-in Date** – Required field that auto fills with the current date.
- **Due Date** – Required field that auto fills with the current date.
- **Additional Comments** – Include comments when creating a PDO for the driver to help with the order once received.

Delivery

Delivery

Product Name Propane - Home Heating	Product ID PropHH	Product Location Main Plant	
Determine Remaining By Calculated 	Current %* 0	<input type="checkbox"/> Out of Gas	Times Out of Gas 0
Delivery By* Fill Percent 	Delivery Amount (%)* 0	Charge Price (\$/Gal) 3.85	



- **Product Name / Product ID / Product Location**
 - If a Tank is not selected, the following message displays: *Select a Tank to manage delivery options.*
 - Once a tank is selected, the *Product Name*, *Product ID*, and *Product Location* attached to the Tank will display. Using the **Change Product** button opens a Product search overlay for a new Product selection.
 - If there is not a Product attached to the Tank, **+ Product** displays and is mandatory to save an Product Delivery Order.
- **Determine Remaining By / Current %**
 - If a tank has a monitor, the *Determine Remaining % By* drop-down will default to *Monitor with Current (%)* or optionally choose *Calculated*.
 - If a Tank does not have a monitor, the default is *Calculated* and displays in a read-only state with *Estimated (%)*. *Estimated (%)* will default to values in the database but can be changed.
- **Out of Gas** – Mark the tank on the as *Out of Gas*
 - **Times Out of Gas** – Counts how many times the Tank has previously been out of gas.
- **Delivery By** – Defaults to *Fill Percent* or choose *Number of Gallons* or *Amount of Purchase*.
- **Delivery Amount (%) / Delivery Amount (Gal) / Amount of Purchase (\$)**
 - If *Fill Percent* is selected, *Delivery Amount %* displays with an initial value of 0. This can be changed if needed and has a maximum of three numeric characters.

- If *Number of Gallons* is selected, *Delivery Amount (Gal)* displays with an initial value of 0. This can be changed if needed and has a maximum of five numeric characters.
- If *Amount of Purchase* is selected, *Amount of Purchase (\$)* displays with an initial value of 0. This can be changed if needed and has a maximum of four numeric characters.
- **Charge Price** – Price charged per gallon.

Notify Driver

Upon saving the PDO, a standard formatted email will be sent to the email associated with that driver. By default, any Drivers already linked to a tank will display. Additional drivers can be selected by choosing the **+ Add Driver** button.

Notify Drivers

Driver ID	Driver Name	Driver Email	Preview Message	Delete
678RT	Jane Example	fueltest@agvance.net		

[+ Add Driver](#)

- **Driver ID**
- **Driver Name**
- **Driver Email**
- **Preview Message** –Selecting *Preview Message* will open a dialog showing what the message to the driver will look like.
 - Email from will default to the company's email as the sender.
 - *Email To* will show Drivers email address.
 - *Subject* to read *Product Delivery Order #TBD / Delivery Scheduled*.

Driver Email Preview

Email To
fueltest@agvance.net

Subject
Product Delivery Order #TBD /Delivery Scheduled

Message

Order Info:

Larry Baker (12345)

Propane - Home Heating

Amount: 0

Fill to 0 at 3.85/Gal

Deliver By: 09/25/2025

Current Tank%: 0

Notes:

SN: 250159

Size: 500

2500 N 1140 Rd E

Shelbyville IL, 62565

Desc: Home Heat

Route: North

Region: East

Directions/Notes:

Message Recipients:
fueltest@agvance.net

Close

- **Delete** – Removes the selected Driver from receiving notifications.
- **+ Add Driver** – When selected, a Driver search modal displays to choose from a list of active drivers.

Saving or Canceling

Select **Create Order** will save the new Product Delivery Order and route back to the *Orders* list page. A validation banner at the bottom of the screen indicates the order has successfully been saved.

- If any required inputs are empty, the validation banner will display at the top of the page, below the header, calling attention to required inputs.
 - A Tank must be added.
 - *Delivery Amount (% or Gal)* or *Amount of Purchase (\$)* must be entered.
 - The validation banner and error state of inputs will display until the user selects **Create Order** after entering required content.

Select **Cancel** to close out and return to the *Orders* screen. If any field was populated, a message displays stating the Tank will not be saved. Select **Discard & Continue** to cancel the Tank or **Go Back** to return to the *Add Product Delivery Order* form.

Product Delivery Order Will Not Be Saved

If you leave this page without saving, any information entered for this product delivery order will not be saved.

[Discard & Continue](#) [Go Back](#)

AR Invoices

View a listing of Energy Invoices tied to Product Delivery Orders (PDO) on the *Invoices* tab at *SKY / Energy / Orders*. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.

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Export

Invoice ...	Status	PDO Nu...	Date PD...	Control ...	Deliver...	Due Date	Tank Se...	Tank De...	Custom...
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
146	Paid	4015	11/14/2024	--	10/16/2024	10/16/2024	A123C589	Home Heat	999999
147	Open	4017	11/14/2024	--	10/16/2024	11/14/2024	461235	Grain Dryer	999999
141	Paid	4011	01/18/2024	--	01/18/2024	01/18/2024	A123C589	Home Heat	999999
142	Paid	4012	01/18/2024	--	01/18/2024	01/18/2024	461235	Grain Dryer	999999
123	Voided	3006	02/28/2023	--	02/28/2023	--	250159	Home Heat	12345
124	Paid	3007	02/28/2023	--	02/28/2023	--	250159	Home Heat	12345
125	Paid	3006	02/28/2023	--	02/28/2023	--	250159	Home Heat	12345
126	Paid	3008	02/28/2023	--	02/28/2023	02/28/2023	250159	Home Heat	12345

Items per page50

The *Invoice Number* is tied to the Invoice. View more Invoice details by selecting the *Invoice Number* link on any row.

Invoice ...
Filter
147

Invoice #147

Open

Tank & Customer

Location

00MAIN

Tank Serial Number

461235

Tank Description

Grain Dryer

Invoice Details

Product Delivery Order Number

4009

Control Number

—

Call-in Date

01/17/2024

Invoice Date

11/13/2024

Due Date

11/13/2024

Cash On Delivery

No

Salesperson

Steven Bean

Additional Comments

461235 / Grain Dryer

The Invoice opened shows more details including the *Status* (*Open* (*Invoiced*), *Reversed*, *Voided* and *Paid*), *Location Name*, *ID* and split information if applicable. The *Tank Serial Number* is tied to PDO/Invoice and when clicked opens a new tab viewing the *Tank Info* page for that specific tank. The *Product Delivery Order Number* opens a new tab to view the relative *Product Deliver Order* page and related information.

Product

2

0

Export

Product... ↑	Product... ↑	Depart... ↑	Depart... ↑	Product... ↑	Locatio... ↑	Quantity ↑	Invento... ↑	Add
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
Roadmaster...	RoadClear	Clear Diesel...	DslC02	SSI Farm Se...	00MAIN	257	Gal	Sou

Items per page 50

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Origin City

State / Province

Destination City

State / Province

County

Mode of Transportation

Product Delivery Order Details

Deliver By

--

Amount of Purchase

\$—

Charge Price


\$— / Gal

Amount Needed

— Gal

Invoices also show Product detail in grid form and additional PDO details below the grid. The list can be narrowed using the **Filter** icon and filter criteria or by typing in the search bar located in the header to populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.

Pricing details display on the Invoice view for review or referencing Energy Invoices.

Pricing ▲											
Tester (000000)											
Product Name	Product ID	Quantity	Inventory Unit	Unit Price	Billing Unit	Total User Price	Prepay	Split %	Tax	Tax Ex	
Propane - Home Heating	PropHH	500.000	Gal	\$ 3.85	Gal	\$ 1,925.00	\$ 0.00	100.000%		—	

◀
▶

Subtotal:	\$1,925.00
Prepay Dollars Used:	\$0.00
Sales Tax:	\$0.00
Amount Due:	\$1,925.00

Note: Any field without data will show a double dash (--).

Budget Billing

The *Budget Billing* tab displays a list view of all Budget Billing customer invoices at *SKY / Energy / Orders*. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.

Selecting the **Paid** status from *Budget Billing* tab opens the Customer's *Payments* page in SKY Customer in a new tab.

For all non-budget billing energy invoices see the *AR Invoices* tab.

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Budget Billing

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Budget L...	Invoice ...	Status	Location...	Location	Custom...	Custom...	Tank Se...	Tank De...	Month
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
1	10/31/2017		00MAIN	Main Plant	James Ade	AdeJa	250156	Home Heat	1
2	10/31/2017		00MAIN	Main Plant	Donna Roper	ROHRDE	354161	Home Heat	1
3	11/01/2020		00MAIN	Main Plant	Tommy Tester	999999	A123C589	Home Heat	12
4	12/30/2021		00MAIN	Main Plant	James Ade	AdeJa	250156	Home Heat	12
5	12/30/2021		00MAIN	Main Plant	Tommy Tester	999999	A123C589	Home Heat	12
6	01/26/2023		00MAIN	Main Plant	Tommy Tester	999999	A123C589	Home Heat	12
7	01/26/2023		00MAIN	Main Plant	James Ade	AdeJa	250156	Home Heat	12
8	01/26/2023		00MAIN	Main Plant	Donna Roper	ROHRDE	354161	Home Heat	12
9	01/26/2023		00MAIN	Main Plant	Tommy Tester	999999	A123C589	Home Heat	12

Items per page

50

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